

## Job Aid: Create a Quote in COMMBUYS

### This Job Aid shows how to:

- Create a quote in response to a bid in COMMBUYS

### Of Special Note:

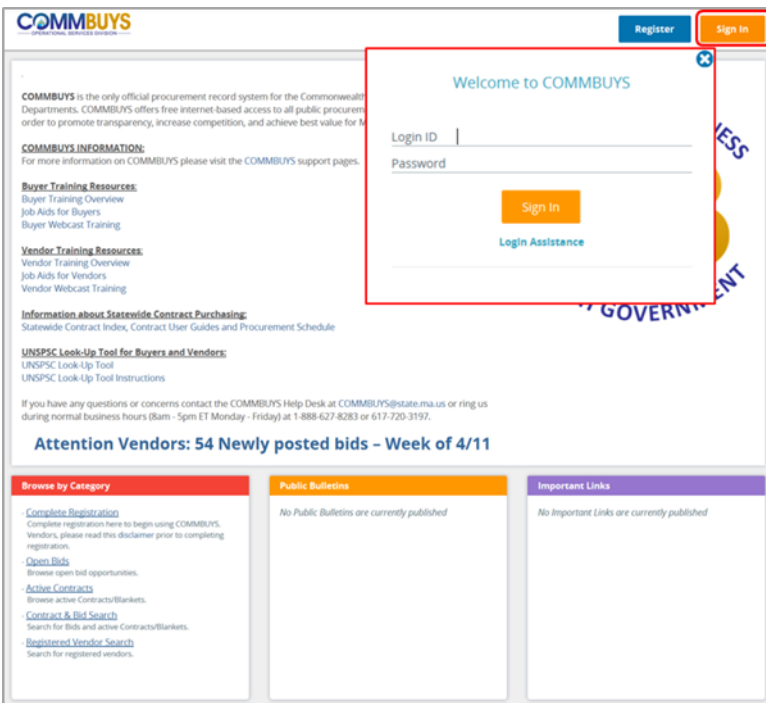
It is the vendor's responsibility to read the bid and any attachments (including the Request for Response) in its entirety prior to creating and submitting a quote.

OSD recommends you create a bid specific folder that is easily accessible with any completed documents or forms that must accompany the quote. Be sure to follow any file upload instructions provided by the buyer (e.g. naming convention, file description, or file size).

Only users with Seller privileges can create a quote in COMMBUYS. These instructions assume the logged in user has Seller credentials.

### Screenshot

### Directions



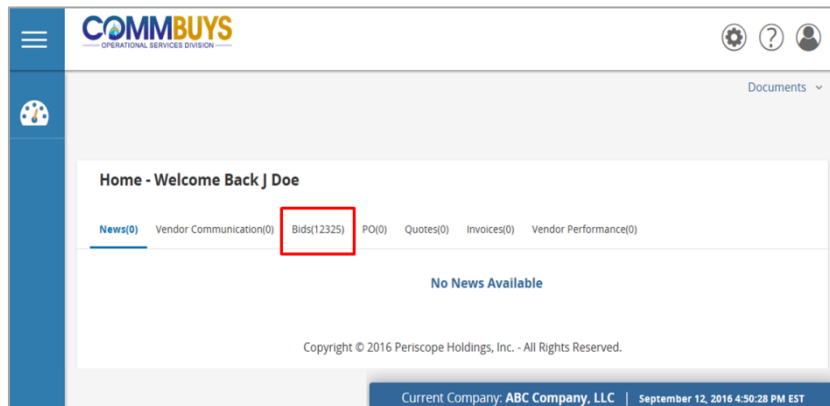
### Step 1: Launching COMMBUYS

1. Enter the uniform resource locator (URL) address for COMMBUYS (<https://www.commbuys.com>) or ([commbuys.com](https://commbuys.com)) in your browser.
2. Once the COMMBUYS landing page displays click on the **Sign In** button.
3. Enter your **Login ID** and **Password** and sign in to COMMBUYS.

## Job Aid: Create a Quote in COMMBUYS

### Screenshot

### Directions



#### Step 2: Accessing Bids

1. From the Homepage click on the **Bids** tab to view bids that have been sent to your company.

Home - Welcome Back J Doe

News(0) Vendor Communication(1) **Bids(12347)** PO(5) Quotes(5) Invoices(0) Vendor Performance(0)

[Request For Revision](#)

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
QT-1080-OSD07-OSD07-15666-R1	Operational Services Division	BD-17-1080-OSD07-OSD07-8393	09/15/2016 11:47:15 AM	09/15/2016 11:42:55 AM

[Bids / Bid Amendments \(Un-Acknowledged\)](#)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Holder
BD-17-1080-OSD07-OSD07-8397	Operational Services Division		Regina Kinney	Landscaping / Green Roof Products, Playground Equipment	09/21/2016 12:00:00 AM	<a href="#">List</a>
BD-17-1080-OSD07-OSD07-8393	Operational Services Division		Regina Kinney	RFR for Temp Help	09/15/2016 11:47:15 AM	<a href="#">List</a>

[Open Bids](#)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
BD-17-1080-OSD07-OSD07-8455	Operational Services Division		Regina Kinney	Print, Copy & Mail Services, and Printed Promotional Products	09/28/2016 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	<a href="#">List</a>
BD-17-1080-OSD07-OSD07-8454	Operational Services Division		Regina Kinney	Foodservice Supplies and Equipment, Institutional Commercial Grade	09/28/2016 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	

[Open/Rolling Enrollment Bids](#)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
BD-17-1080-1080C-1080L-8433	Operational Services Division		Samuel Lee	Samtest	09/28/2016 10:39:55 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	
BD-17-1080-OSD06-OSD06-8418	Operational Services Division		Donna Ellis	PHI-DA-Open_Rolling-A001	09/15/2017 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	

#### Step 3: Opening Bids

1. Click on the hyperlinked **Bid #** to open and review a bid in the **Bids/Bid Amendments (Un-Acknowledged)**, **Open Bids**, or **Open/Rolling Enrollment Bids** sections.

#### Acknowledge Receipt and View Solicitation

**Bid #** BD-17-1080-OSD07-OSD07-8455

**Bid Description** Print, Copy & Mail Services, and Printed Promotional Products

Click Yes to acknowledge the download of the bid. When you acknowledge a bid, you may receive any future correspondence regarding this document. If you do not want to acknowledge click No, and the bid will be displayed. Do you want to continue?

Yes

No

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#### Step 4: Acknowledging Receipt of Bids

1. Click the **Yes** button to acknowledge and access the bid.

**Note:** In this acknowledgement you agree to receive any future correspondence regarding this bid.

If you select **No** you may still view the bid but will not receive any notifications regarding updates or amendments.

## Job Aid:

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#### Screenshot

#### Directions

Bid Solicitation: BD-17-1080-OSD07-OSD07-8455

##### Header Information

<b>Bid Number:</b>	BD-17-1080-OSD07-OSD07-8455	<b>Description:</b>	Print, Copy & Mail Services, and Printed Promotional Products	<b>Bid Opening Date:</b>	09/28/2016 12:00:00 AM
<b>Purchaser:</b>	Regina Kinney	<b>Organization:</b>	Operational Services Division	<b>Allow Electronic Quote:</b>	Yes
<b>Department:</b>	OSD07 - OSD TRAINING	<b>Location:</b>	OSD07 - OSD TRAINING	<b>Available Date :</b>	09/22/2016 10:54:04 AM
<b>Fiscal Year:</b>	17	<b>Type Code:</b>	SS - Statewide Solicitation	<b>Informal Bid Flag:</b>	No
<b>Alternate Id:</b>		<b>Required Date:</b>		<b>Open Enrollment Enabled:</b>	<input type="checkbox"/>
<b>Info Contact:</b>		<b>Bid Type:</b>	OPEN		
<b>Purchase Method:</b>	Open Market	<b>Rolling Enrollment Enabled:</b>	<input type="checkbox"/>		

##### Pre Bid Conference:

##### Bulletin Desc:

<b>Ship-to Address:</b>	OSD Training 1 Ashburton Place Suite 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890	<b>Bill-to Address:</b>	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890	<b>Print Format:</b>	Bid Print
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**File Attachments:** [Standard Contract Form](#)  
[Request for Response \(RFR\)](#)  
[Business Reference Form](#)

##### Form Attachments:

SBPP (Small Business Purchasing Program) Eligible? NO

##### Item Information

##### Item # 1: ( 82-12 - 15 ) Printing Services

UNSPSC Code: 82-12-15  
Printing

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		EA - Each				
<b>Manufacturer:</b>		<b>Brand:</b>		<b>Model:</b>		
<b>Make:</b>		<b>Packaging:</b>				

Print Page

Create Quote

Bid Q & A

Exit

#### Step 5: Reviewing Bids

- Review the following information displayed on the bid's Summary tab:
  - Bid Number:** COMMBUYS-generated document number.
  - Description:** the information displayed in this section varies by the buyer. It could be the agency's internal bid number, a brief description of the bid, or keywords that describe the goods or services being procured.
  - Bid Opening Date:** date the bid is opened for evaluation. This is also the date the bid closes to quote submission by vendors.
  - Purchaser:** contact person and/or the creator of the bid.
  - Organization, Department, Location:** agency information.
  - Type Code:** will either be **SW** (for Statewide bids) or **NS** (for Non-Statewide/Departmental bids).
  - Allow Electronic Quote:** should always be **Yes**. This allows vendors to submit their quote response through COMMBUYS.
  - Required Date:** date agency requires the goods or services being procured. Follow up with bid contact.
  - Available Date:** date bid was posted on COMMBUYS.
  - Info Contact:** contact person for the bid.
  - Bid Type:** will either be **Open** (any vendor can respond) or **Closed** (only selected vendors can respond).
  - Informal Bid Flag:** will either be **Yes** (buyer can see quotes before the Bid Opening Date) or **No** (buyer cannot see quotes before the Bid Opening Date).
  - Purchase Method:** will either be **Open Market** (one time bid) or **Blanket** (contract).
  - Pre-Bid Conference Details**
  - Ship-to and Bill-to Addresses**
  - File Attachments:** bid forms and documents uploaded by the agency. Be sure to read all attachments and complete/submit forms/documents as instructed.
  - Item Information:** item description, UNSPSC code, and other criteria entered by the buyer.

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#### Directions

**Item Information**

**Item # 1: ( 82-12 - 15 ) Printing Services**

U N S P S C Code: 82-12-15  
Printing

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		EA - Each				

Manufacturer:                      Brand:                      Model:

Make:                                  Packaging:

#### Step 6: Creating Quotes

1. Click the **Create Quote** button at the bottom of the **Bid Summary** page to open the **New Quote** page.

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#### Directions

**New Quote**

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Quote #: Bid #: **BD-17-1080-OSD07-OSD07-8455**

Organization: Operational Services Division

Status: In progress Description\*: Print, Copy & Mail Services, and Pri

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

Shipping Terms: Shipping Terms: Freight Terms: Freight Terms: Payment Terms: Payment Terms:

Ship Via Terms: Ship Via Terms:

Promised Date: (MM/DD/YYYY) Info Contact: Info Contact:

Comments: Comments:

Date Last Updated: User Last Updated:

[Save & Continue](#)

#### Step 7: Entering General Quote Information

- The General Tab is populated with some information from the bid. All fields on this page are options with the exception of the **Description**. Fields available to update include:
  - Description**: Defaults to the description of the bid. This can be edited.
  - Delivery Days**: Days to deliver goods or services upon successful awarding of bid/purchase order.
  - Discount Percent**: If entered, will automatically be applied to all items on quote. This can be done on an item by item basis on the item tab.
  - Is "No Bid"**: Checkmark to formally declare that you will not be submitting a quote for this bid.
  - Alternate Bid**: Checkmark to formally flag a quote as an alternate bid if this is the second quote for the vendor (if allowed by the buyer).
  - Shipping Terms**: Defaults from the vendor profile.
  - Freight Term**: Defaults from the vendor profile.
  - Ship Via Terms**: Defaults from the vendor profile.
  - Payment Terms**: Defaults from the vendor profile.
  - Promised Date**: Date to deliver items to the buyer.
  - Info Contact**: Contact information for questions regarding quote. This field is limited to 400 characters.
  - Comments**: Field to enter in notes to the buyer. This field is limited to 400 characters.
- Click the **Save & Continue** button to save your updates and generate a **Quote Number**.

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### Screenshot

### Directions

**Quote Validation Errors**  
Terms & Conditions is not acknowledged.

**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

**General** Items Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Quote #: QT-1080-OSD07-OSD07-15710 Bid #: **BD-17-1080-OSD07-OSD07-8455**

Organization: Operational Services Division

Status: In progress Description\*: [Print, Copy & Mail Services, and Pr](#)

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

#### Step 8: Reviewing System Messages

- Once you click **Save & Continue** the page will refresh itself and display two system messages and a **Quote Number**.
- The following messages will be displayed:
  - A red error message that reads: **Terms and Conditions is not acknowledged**. To resolve this, click on the **Terms & Conditions** tab to accept the terms.
  - A yellow warning that reads: **Your quote has not been submitted**. There is no further action required to resolve this. This is an informational message.
- Click on the **Items** tab to continue creating your quote.

**General** **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

**General** Notes

Sort by Column: **Print Sequence** ☐ Sort Descending **Go**

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1	1.0	No	Printing Services	1.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alternate Description: <input type="text"/>												
2	2.0	No	Copying Services	1.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alternate Description: <input type="text"/>												

Current Company: ABC Company, LLC | September 23, 2016 2:48:07 PM EST

#### Step 9: Entering Pricing

- Input your quote information (e.g. Unit Cost, Discount, Freight) for the goods or services you wish to bid on. To view additional details about an item, click on the blue hyperlinked **Item #**.
- Once all information has been completed on the **Items** tab click **Save & Continue**.
- Click on the **Terms & Conditions** tab.

**Note:** By default the **No Bid** box will be checked off. Remember to enter a **Unit Cost** or check the **No Charge** if no dollar amount is required for the quote.

By leaving a checkmark in the **No Bid** box you are indicating that you are not submitting a price quote for the item.

**General** **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

**General** Notes

Sort by Column: **Print Sequence** ☐ Sort Descending **Go**

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1	1.0	No	Printing Services	1.0	EA	34.20	2.00		0.00	\$33.52	<input type="checkbox"/>	<input type="checkbox"/>
Alternate Description: <input type="text"/>												
2	2.0	No	Copying Services	1.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alternate Description: <input type="text"/>												

Current Company: ABC Company, LLC | September 23, 2016 3:10:45 PM EST

## Job Aid: Create a Quote in COMMBUYS

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**Quote Validation Errors**  
Terms & Conditions is not acknowledged.

**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
<a href="#">Standard Contract Form ()</a>	Commonwealth Terms and Conditions	12,567 bytes
<a href="#">Request for Response (RFR) ()</a>	Specifications and Requirements for Bid Submission	12,574 bytes
<a href="#">Business Reference Form ()</a>	Provide at least 3 recent (w/in 12 months) customers' contact info	12,574 bytes

Do you accept the terms & conditions of the bid?

☒ Yes ☐ Yes with exceptions ☐ No

If you do not fully accept the terms & conditions, please note the exceptions below:

[Save & Continue](#)

#### Step 10: Accepting Terms & Conditions

1. Click the radio button next to **Yes** to accept the Terms & Conditions.
2. Click **Save & Continue**.
3. Click on the **Attachments** tab.

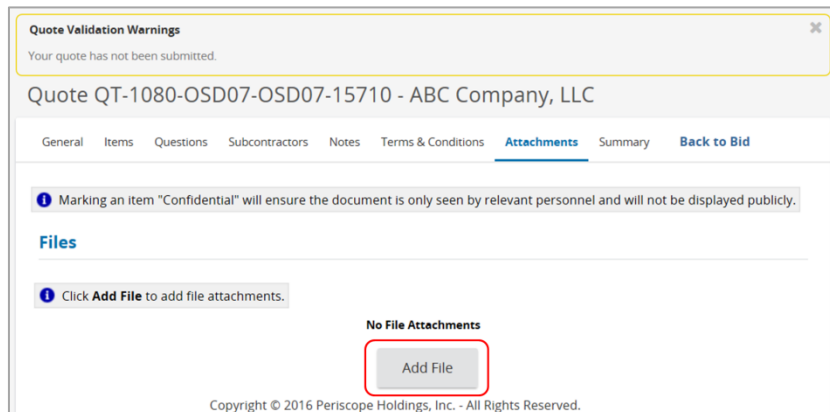
Note: Any files uploaded to the bid by the buyer (such as the RFR) can also be found in the **Terms & Conditions** tab.



## Job Aid: Create a Quote in COMMBUYS

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**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Attachments** Summary Back to Bid

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

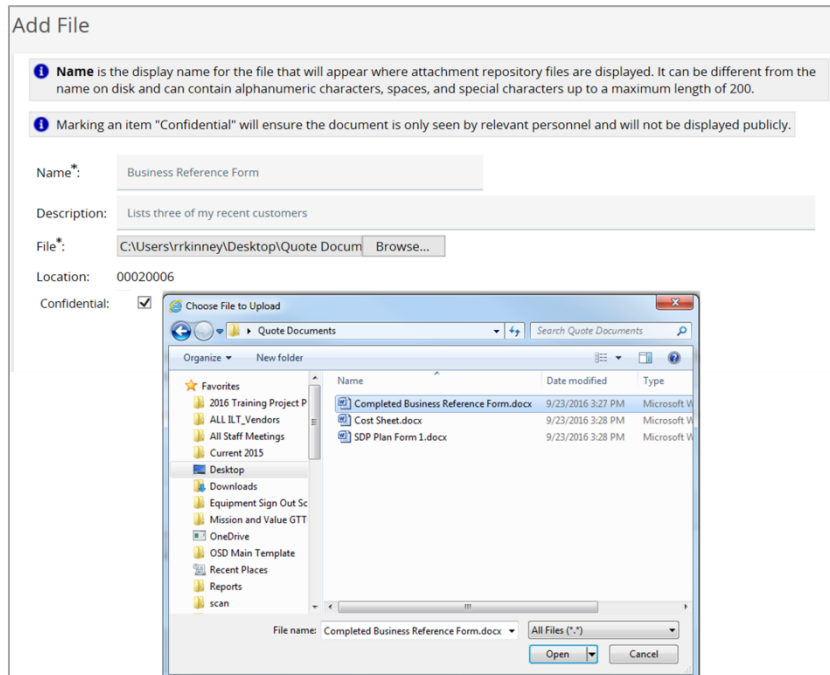
**Files**

Click **Add File** to add file attachments.

No File Attachments

**Add File**

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**Add File**

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name\*: Business Reference Form

Description: Lists three of my recent customers

File\*: C:\Users\rrkinney\Desktop\Quote Docum Browse...

Location: 00020006

Confidential: ☒

Choose File to Upload

Name	Date modified	Type
Completed Business Reference Form.docx	9/23/2016 3:27 PM	Microsoft Word
Cost Sheet.docx	9/23/2016 3:28 PM	Microsoft Word
SDP Plan Form 1.docx	9/23/2016 3:28 PM	Microsoft Word

File name: Completed Business Reference Form.docx All Files (\*.\*)

Open Cancel

### Step 11: Attaching Documents to Quote

1. Click on **Add File**.
2. Click on **Browse** to locate the file you wish to upload.
3. Once the correct file is located, click **Open** to return to the **Add File** page.
4. By default, the file's name is populated into the **Name** field. This can be edited to reflect that you wish to display when the file is posted. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters.
5. The **Description** field is optional and it allows you to briefly describe the attached file.
6. Check off the **Confidential** box to designate an attachment as confidential.
7. Once you are done naming and describing your file, click **Save & Exit** to return to the **Attachments** tab.

**Note:** Each document must be added one at a time. To add additional attachments repeat the actions 1-6 within this step.



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**Quote Validation Warnings**  
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(3)** Summary Back to Bid

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

**Files**

Name	Description	Confidential	Order	Attached By	Attached Date	Delete
Business Reference Form (view details)	Lists three of my recent customers	<input type="checkbox"/>	0	J Doe	09/23/2016	<input type="checkbox"/>
Cost Sheet (view details)	Detailed Prices for printing services	<input type="checkbox"/>	0	J Doe	09/23/2016	<input checked="" type="checkbox"/>
SDP Plan Form 1.docx (view details)		<input type="checkbox"/>	0	J Doe	09/23/2016	<input type="checkbox"/>

Save & Continue Add File

#### Step 12: Removing Attachments

1. Check the box in the **Delete** column next to the file you wish to remove.
2. Click **Save & Continue** to remove the file from the attachment list.
3. Click the **Summary** tab to review your quote information.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments(2) **Summary** Back to Bid

**Header Information**

Quote #:	QT-1080-OSD07-OSD07-15710	Bid #:	BD-17-1080-OSD07-OSD07-8455	Status:	In progress
Organization:	Operational Services Division	Delivery Days:	0	Discount Percent:	0.0
Description:	Print, Copy & Mail Services, and Printed Promotional Products	Alternate Bid:	No	Shipping Terms:	
Bid Flag:		Ship Via Terms:		Payment Term:	
Freight Terms:		Info Contact:		Quote Total	\$33.52
Promised Date:		User Last Updated:	J Doe		
Comment:	Vendor accepts the terms & conditions with no exceptions.				
Date Last Updated:	09/23/2016 03:23:42 PM				

**Attachments**

Agency Files:

Agency Forms:

Vendor Files:

Vendor Forms:

**Item Information**

Print Sequence # 1.0 : ( 82-12 - 15 ) Printing Services

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$34.20	2.0%	0.0%	\$0.00	\$33.52	No	No

Print Submit Quote Cancel Quote

#### Step 13: Reviewing and Submitting Quotes

1. Review the quote information displayed on the **Summary** tab, and edit as needed by clicking on the tab that requires updating.
2. If no updates are required, click the **Submit Quote** button at the bottom of the page.

**Message from webpage**

Are you sure you want to submit this quote?

OK Cancel

#### Step 14: Confirming Quote Submission

1. Click **OK** on the popup message window to proceed with submitting your quote.

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Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments(2) **Summary** Back to Bid

**Header Information**

<b>Quote #:</b> QT-1080-OSD07-OSD07-15710	<b>Bid #:</b> BD-17-1080-OSD07-OSD07-8455	<b>Status:</b> Submitted
<b>Organization:</b> Operational Services Division		
<b>Description:</b> Print, Copy & Mail Services, and Printed Promotional Products	<b>Delivery Days:</b> 0	<b>Discount Percent:</b> 0.0
<b>Bid Flag:</b>	<b>Alternate Bid:</b> No	<b>Shipping Terms:</b>
<b>Freight Terms:</b>	<b>Ship Via Terms:</b>	<b>Payment Term:</b>
<b>Promised Date</b>	<b>Info Contact:</b>	<b>Quote Total</b> \$33.52
<b>Comment:</b>		
<b>Date Last Updated:</b> 09/23/2016 04:07:34 PM	<b>User Last Updated:</b> J Doe	

Vendor accepts the terms & conditions with no exceptions.

**Attachments**

Agency Files:

Agency Forms:

Vendor Files: Business Reference Form  
SDP Plan Form 1.docx

**Item Information**

Print Sequence # 1.0 : ( 82-12 - 15 ) Printing Services

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$34.20	2.0%	0.0%	\$0.00	\$33.52	No	No

Print Withdraw Quote

### Step 15: Withdrawing Quotes After Submission

1. The **Summary** tab redisplay with an updated status for the quote of **Submitted**.
2. From the **Summary** tab of the quote, you can **withdraw** the quote at any time before the **Bid Opening Date** or before the quote is viewed by the buyer.

For more information on withdrawing quotes, please read the **Withdraw, Reopen, and Resubmit a Quote in COMMBUYS** job aid.